I guess the only thing I would say on the draft is we need to humanize it a little bit in the intro sentence…

Something along the lines of… I greatly appreciate all of the efforts that everyone in the region is putting in to both dealing with the GK mine spill, as well as keeping the rest of our important work moving forward. During these surge times, I feel it is important to remind you all of the need to preserve agency records, especially in the area of text messages…

I think Deb or I will send out… I will get with her to see…

Rick

Rick Buhl

Assistant Regional Administrator, Office of Technical and Management Services

USEPA Region 8 | 1595 Wynkoop St (8TMS-IO) | Denver, CO 80202-1129

Office: (303) 312-6920

Need a Meeting? Contact Missy Haniewicz at 303-312-7059

From: Duran, Matt
Sent: Wednesday, August 12, 2015 11:46 AM
To: Buhl, Rick
Cc: Kortuem, Patrice
Subject: fyi only. FW: Action needed. DRAFT Please review and attach guidance where indicated. Thanks.

Not for publishing yet, but we need your thoughts on who sends. Could come from Phoebe, me, you, or ORC?

It is possible that ORC may have their own draft, and we'll consult as quickly as possible to either merge or choose one draft.

We are cranking hard to finish draft before noon.

Matt Duran

Director, Information Systems Program

Office of Technical and Management Services

EPA Region 8

1595 Wynkoop St. (8TMS)

Denver, CO 80202-1129

(303)312-6921 office

(720) 537-1368 mobile

From: Duran, Matt
Sent: Wednesday, August 12, 2015 11:43 AM
To: Boydston, Michael
Cc: MacLeish, Phoebe
Subject: FW: Action needed. DRAFT Please review and attach guidance where indicated. Thanks.

Mike,

Can you review the material below. We are doing our best to produce guidance before noon internal deadline.

Thanks.

Matt Duran

Director, Information Systems Program

Office of Technical and Management Services

EPA Region 8

1595 Wynkoop St. (8TMS)

Denver, CO 80202-1129

(303)312-6921 office

(720) 537-1368 mobile

From: MacLeish, Phoebe
Sent: Wednesday, August 12, 2015 10:55 AM
To: Duran, Matt
Subject: RE: Action needed. DRAFT Please review and attach guidance where indicated. Thanks.

Draft:

According to EPA records management guidelines, EPA discourages the use of text messaging, on any mobile device, to send or receive substantive (or non-transitory) Agency records. While

we recognize the value text messaging can provide, especially during emergency response situations, records management guidelines *must* be followed. In light of that, I wanted to take this opportunity to remind you that if you are using text messages to create substantive or "non-transitory" messages, they need to be persevered in accordance with agency policy and federal law. The information below provides guidance on how to forward text messages to your email account in order to preserve them:

Quick Reference Guide

How to Save Text Messages

EPA *discourages* the use of text messages for transmitting substantive (or non-transitory) federal records. (Wait, what is a "non-transitory" or "substantive" record?) If a substantive (or non-transitory) text message is sent or received on your mobile device, it must be saved into an approved records management system. In order to comply with this requirement, you can forward the text message into the EPA email system, so that you may then save it as a record using EZ Email Records, or another approved recordkeeping system. When forwarding the text message from the mobile device to the EPA email system, you must include contextual information such as the time, date, subject, and sender/recipient of the message. Please follow the instructions below to manage text messages that are substantive (or non-transitory) records.

How to Forward Text Messages to Email from an iPhone

1. Tap the *Messages* icon on the device.

2. Find the text message conversation that you need to save as a record.

3. Tap and hold one of the text messages in the conversation.

4. Tap the "*More*" option that appears above the text message.

5. Put a check mark in the circle beside any or all of the text messages that you want to save as records.

6. Tap the blue arrow icon in the lower right corner of the screen.

7. Type your EPA email address in the "*To*" field.

8. After the text message, enter contextual information about the message including: to, from, date, time, and a relevant subject, then tap "Send." For example, add "(To: Susan Employee, From John Worker, Date: 01.01.15, Time: 6:35 PM, Subject: Project Y)."

9. After receiving the email containing the text message, follow the EZ Email Records process in Outlook to save the email as a record. After following these instructions, you may also notice that a copy of the message containing the contextual information created in step 8, appears in your list of messages in the Messages app on your phone.

http://intranet.epa.gov/mobiledevices/pdf/Instructions-Saving-Text-Messages.pdf

Additionally, as reflected in the Agency's Records Policy, all official business should first and foremost be done on Agency devices, and not on personal devices (see some highlights of the policy posted below or go to www.epa.records.gov)

"All EPA staff generate and receive records and are legally required to maintain them. Records document the Agency's business and can be found in all media such as paper, email, instant messaging (IM), text messages, telephone messages, voice mail messages,

presentations, websites, social media (e.g., Facebook, Twitter, etc.), word processing documents, spreadsheets, and information systems. If electronic records are created using any of these media, they need to be transferred to an electronic records management system.

Official Agency business should first and foremost be done on official EPA information systems. The FRA now prohibits the creation or sending of a federal record using a non- EPA electronic messaging account unless the individual creating or sending the record either: (1) copies their EPA email account at the time of initial creation or transmission of the record, or (2) forwards a complete copy of the record to their EPA email account within

20 days of the original creation or transmission of the record. These FRA requirements are designed to ensure that any use of a non-EPA information system does not affect the preservation of federal records for FRA purposes, or the ability to identify and process those

records if requested under the Freedom of Information Act (FOIA), Privacy Act or for other

official business (e.g., litigation, congressional oversight requests, etc.). EPA strongly discourages the use of personal email or other personal electronic messaging systems, including text messaging on a personal mobile device, for sending or receiving Agency records, but to the extent such use occurs, the individual creating or sending the record from a non-EPA electronic messaging system must copy their EPA email account at the time of transmission or forward that record to their EPA email account within 20 days of creation or sending.

Additionally, EPA discourages the use of text messaging on a mobile device for sending or receiving substantive (or non-transitory) Agency records. However, EPA recognizes that some Agency staff perform time-sensitive work that may, at times, require the creation of substantive (or non-transitory) records in the form of text messages for emergency or environmental notification purposes. In those

limited instances, staff must continue to save and manage any text message records related to their work...."

~~~~~~

Phoebe MacLeish

Regional Records Officer

Privacy Liaison Officer

US EPA -Region 8

1595 Wynkoop St.

Denver, CO 80202

303.312.6546

Macleish.phoebe@epa.gov

From: MacLeish, Phoebe
Sent: Wednesday, August 12, 2015 10:38 AM
To: Duran, Matt
Subject: RE: Action needed. DRAFT Please review and attach guidance where indicated. Thanks.

See comments below. Some record language edits.   Use as you'd like.

Phoebe

~~~~~~

Phoebe MacLeish

Regional Records Officer

Privacy Liaison Officer

US EPA -Region 8

1595 Wynkoop St.

Denver, CO 80202

303.312.6546

Macleish.phoebe@epa.gov

From: Duran, Matt
Sent: Wednesday, August 12, 2015 10:13 AM
To: MacLeish, Phoebe
Subject: Action needed. DRAFT Please review and attach guidance where indicated. Thanks.

-I'm proposing this originate from me, with cc to Rick, Deb/Shaun, etc. They may choose to originate it from Rick or ORC.

-

Please integrate into your current draft planning

DRAFT

Good Afternoon,

~~Due to~~ According to EPA records management ~~issues~~guidelines, EPA discourages the use of text messages. While we ~~We also~~ recognize the value text messaging can provide, especially during emergency response situations, records management guidelines *must* be followed. In light of that, I wanted to take this opportunity to remind you that if you are using text messages to create substantive or non-transitory messages they need to be persevered in accordance with agency policy and federal law (http://www.epa.gov/records/faqs/pda.htm)~~(see attachment below for details on what qualifies as a substantive record)~~. The attachment below provides guidance on how to forward text messages to your email account in order to preserve them.

Additionally, as reflected in the Agency's Records Policy, all official business should first and foremost be done on Agency devices, and not on personal devices.

Quick Reference Guide

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5. Put a check mark in the circle beside any or all of the text messages that you want to save as records.

6. Tap the blue arrow icon in the lower right corner of the screen.

7. Type your EPA email address in the "*To*" field.

8. After the text message, enter contextual information about the message including: to, from, date, time, and a relevant subject, then tap "Send." For example, add "(To: Susan Employee, From John Worker, Date: 01.01.15, Time: 6:35 PM, Subject: Project Y)."

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http://intranet.epa.gov/mobiledevices/pdf/Instructions-Saving-Text-Messages.pdf

Matt Duran

Director, Information Systems Program

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